Area	Description	Requirement	Complexity	Type	Total Days
ADM	ED Admin - Don't require a Case Team ID/OPEID when adding users where it does not apply	The request is to 1 - Remove required asterisk marks for the OPE_ID and Case team fields. Maybe add a note to state that one is required based on what type of user you are adding. 2 - Do not require a Case Team ID when adding a screener user (it is N/A)	S	JSP	3
COD	Screener / Code Findings - separate buttons	select to calculate the deficiency indicator without submitting Expected: ability to calculate without having to submit Actual: only a calculate deficiency indicator button is provided. The request is to provide separate buttons. If this is the case we should investigage displaying the result of the calculation on the screen after selecting to calculate.	M	Java	8
COD	Add "Program Area" to the Code Findings Page	Add "Program Area" as an input on the Code Findings page. This value would also need to be added back to the Compliance Audits Summary report.	M	Java	8
GEN	Remove full path storage for uploaded files		M	JAVA	8
GEN	Need capability to record when a school is placed on administrative stay and to "stop the clock" when necessary.	????	C	Java	12
INS	On the One-Day-Balance Sheet, begin and end date have the same date	On the One-Day-Balance Sheet, begin and end date have the same date.	S	JSP	3
INS	Add an edit check to the "TIN" field on both P&A Infor and FS Info to enforce correct TIN format	Add an edit check to the P&A and FS Info page to enforce the proper format for the Auditor TIN Number field.	S	JSP	3
INS	On the Balance Sheet Information page, change the data field from "Property and Equipment, including capitalized lease..."	On the Balance Sheet Information page, change the data field from "Property and Equipment, including capitalized lease assets" to "Property and Equipment, including capitalized lease assets at historical costs"	M	JSP	5
INS	Add third party servicer question for Non-Profit schools.	Page 12 question related to third-party servicers not reflected in the non-profit screens. Should be added.	S	JSP	3
INS	The System will receive the public school financial backing letter.		C	Java	12
INS	The system will alert a public institution user upon submission of a compliance audits/financial statements if there is not a public school letter on file with ED.		M	Java	8
INS	The system will verify which fields are required for an Institution User based on the User's selection of which programs his/her institution participates in.		S	JSP	3
INS	The submitting school (ope id) should appear in the school group list.		S	JSP	3
INS	The system will provide edit checks on the P&A and FS info pages to require the user to answer "yes" to the following questions		S	JSP	3
LOC	LOC Expiration Date Amount LOC# These fields should be required	"LOC Expiration Date Amount LOC # These fields should be required fields." Comments: The required fields have been discussed in detail during the design. Any change to what fields are required should be discussed with the entire core team and approved.	S	JSP	3
LOC	Add ability to handle an unrequested LOC	LOC - Need to be capability to update LOC Information when a school sends in a LOC that was NOT requested by Case and therefore, does not require Co-team leader approval.	C	JAVA	12
LOC	Need ability to edit Amendment Number and Release Date on LOC pages after archived	The request is for the system to provide the ability to allow an FA to record values for the fields "Amendment Number" and "Release Date" on either the determination page with a determination of LOC or on the Complete LOC page after the record has been archived.	M	JSP	5

Area	Description	Requirement	Complexity	Type	Total Days
LOC	Updates to LOC	Complete LOC link needs to be available when any submission is queried and opened. Waivers require a LOC to be submitted currently - the complete LOC link does not appear. I thought this Complete LOC link would occur for all submissions as we can request a LOC at anytime after any submission has been resolved.	M	JAVA	8
LOC	Need the ability to capture 2 reasons for LOC requests and Amounts (Per PIP Procedures Memorandum 03-02).		C	Java	12
LOC	Need New Section and Fields: Section: LOC Collection; Fields: Amount Collected, Date of Collection, Amount Returned to School, Date Returned		C	JSP	8
LOC	New LOC Collection fields above need to be added.	LOC - Need New Section and Fields: Section: LOC Collection; Fields: Amount Collected, Date of Collection, Amount Returned to School, Date Returned	C	Report	12
QC	The system will provide a "quality control" page with fields to capture the date QC'd, the name of the review, and comments/findings.		VC	Java	18
QC	The system will provide a QC role with access to the quality control tracking page for all submissions.		Est. Dup	Java	0
QC	The system will provide write access to the quality control page only to users designated with the role of "QC User."		Est. Dup	Java	0
RES	DDIF - Error	DDIF - Screen should not clear when an edit/error occurs.	S	JSP	3
RES	Surpress ARS Edit Checks on Submit to Co-Team if the only reason for referral is Change in Auditor	The request is to allow an ARS to Submit to a Co-Team leader without having to complete an ACD, DDIF, and FAD if the only reason for referral is Change in Auditor. Currently they are required to at least put some values in for each page even if the only action is to update auditor info.	M	JAVA	8
RES	Set Resolution Due Date To Start When Co-Team Leader Assigns for Financial Statement	The request is to start the resolution clock when the Co-Team leader assigns a Financial Statement Submission to a Financial Analyst. The system currently starts the clock upon submission. The fix will need to be applied to the Reports where a resolution due date is displayed as well.	S	JAVA	4
RES	Display both eZ-Audit and FSA composite score	Composite Score - When Case recalculates the score, the new score should appear on the Submission Summary page below the school/eZ-Audit score. Both scores must be saved and retrievable. (We may already have this logged as a SIR)	S	JAVA	4
RES	The system will set a submission to "resubmit" after the completeness has been indicated for both the Compliance Audit and Financial Statement		S	Java	4
ROL	The System will provide users from the Office of Chief Financial Officer (CFO) view access to the FAD Letter.		VC	Java	18
SCR	When selecting "Screened Incomplete" and clicking save the user should receive message "Are You Sure". When yes is selected, the school should then be prompted to resubmit.		M	Java	8
WAI	Waiver screen needs the capability to capture Exemption information.		S	Java	4

TOTAL:	212

**CCB Sign-off on Release 1.01
Requirements**

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Ti Baker, Release 1.01 Project Manager

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Date